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Consumption Egg Production in the European Union

The recently released European Commission's update to "Prospects for agricultural markets and income 2004-2011 and the impact of enlargement" has revised figures lower for production of consumption eggs in EU-25.

The July 2004 report projected production growth constrained in the EU-15 (old Member States) by higher production costs and lower margins. However, the EU-N10 (new Member States) were expected to gather pace due to relatively favorable production conditions related to a good environment for investment, proximity to important consumer markets and a strong domestic market.

New EU-25 production has been revised downward for 2011, from 6.40 MMT to 6.22 MMT. EU-15 production was revised downward for 2004 through 2011 while EU-N10 projections are slightly higher for 2007 through 2010, and unchanged at 1.14 MMT in 2011. Imports were unchanged at 30,000 MT for 2004 through 2011. Exports were lowered from 15,000 MT to 9,000 MT in 2011.

Consumption was projected to increase at a slower pace for 2007 through 2011, ending at 6.15 MMT rather than 6.28 MMT. Per capita consumption was revised downward, however EU-N10 per capita figures were revised upward from 2004 through 2009 and then lower in 2010 and 2011.

Update on Avian Influenza in Asia

Cambodia discovered an outbreak of HPAI at a small family farm about 12 km south of Phnom Pehn City. Cambodia introduced a temporary ban on the rearing of poultry in the 3-km-diameter quarantine zones around infected farms and the transportation of poultry into and out of quarantine zones.

From January 27 through February 10, 2005, Thailand reported outbreaks of HPAI in 9 districts of five provinces. As of February 15, 2005 six provinces were still under a 21-day surveillance period imposed by the Department of Livestock Development (DLD), Ministry of Agriculture and Cooperatives. Thailand plans to cull about 2.7 million young free-range ducks to prevent HPAI outbreaks. Ducks are believed to carry the virus without showing clinical signs of the disease. The nomadic nature of free-range farmed ducks can help to spread the disease. Thailand has found a high rate of infection in ducks.

Vietnam has confirmed HPAI in 34 provinces and cities from January 1 through February 15, 2005. Nearly 1.5 million birds, including doves, have died or been culled. On February 7, 2005 the Prime Minister announced a new measure to stop farmers from allowing their ducks to roam freely in canals and rice fields. Vietnam also suspended the breeding of ducks on February 3, 2005.

Source: FAOAIDE News

Consumption eggs market balance for the European Union, 2004-2011 in MMT*

December 2004 Projections

	2004	2005	2006	2007	2008	2009	2010	2011
Usable Production	6.18	6.15	6.16	6.17	6.19	6.21	6.21	6.22
of which EU-15	5.10	5.10	5.10	5.09	5.09	5.08	5.08	5.07
EU-N10	1.08	1.05	1.06	1.08	1.10	1.13	1.14	1.14
Consumption	6.11	6.14	6.14	6.14	6.14	6.14	6.15	6.15
Imports	0.03	0.03	0.03	0.03	0.03	0.03	0.03	0.03
Exports	0.10	0.05	0.05	0.05	0.07	0.10	0.10	0.09
**Per Capita Cons.	13.34	13.37	13.34	13.31	13.28	13.25	13.23	13.20
EU-15	13.30	13.28	13.25	13.23	13.20	13.18	13.15	13.11
EU-N10	13.57	13.83	13.82	13.77	13.73	13.64	13.66	13.69

July 2004 Projections

	2004	2005	2006	2007	2008	2009	2010	2011
Usable Production	6.34	6.35	6.34	6.34	6.36	6.37	6.39	6.40
of which EU-15	5.28	5.29	5.28	5.28	5.27	5.27	5.26	5.26
EU-N10	1.06	1.06	1.06	1.06	1.09	1.10	1.12	1.14
Consumption	6.14	6.1	6.14	6.17	6.20	6.22	6.25	6.28
Imports	0.03	0.03	0.03	0.03	0.03	0.03	0.03	0.03
Exports	0.24	0.28	0.23	0.20	0.19	0.18	0.17	0.15
*Per Capita Cons.	13.40	13.29	13.34	13.38	13.41	13.42	13.45	13.47
EU-15	13.52	13.50	13.47	13.45	13.42	13.40	13.37	13.33
EU-N10	12.78	12.20	12.65	13.02	13.35	13.57	13.86	14.17

EU-N10: Ten New member States

*million metric tons

**kg/person

Source: European Commission

Dutch Egg Production and Consumption

According to figures by the PVE, 9.2 billion eggs were produced in the Netherlands in 2004. That is about the same amount as in 2002. More than 65% of this production was exported as shell egg or egg product with Germany being the most important market.

A rapid transition to alternative housing systems is taking place: over 50 percent of the production is now barn or free range/organic production. The consumption of table eggs has increased to 181 eggs per capita in 2004 (including egg products).

These positive figures for production and consumption have to be seen in the context of the current market where profit margins are small. The average producer price was about 45 percent lower than in 2003.

Source: IEC

Inspected Egg Products-U.S. & Canada Export/Import Trade**U.S. Exports to Canada, in Pounds (000) (Preliminary)**

Week Ending February 12, 2005		Year-To-Date	
TYPE	2005	2004 1/	2005 2/ 2004
Liquid	158	146	1,091 679
Frozen	0	0	0 0
Dried	0	40	21 49
Total	158	186	1,112 728

U.S. Imports From Canada, in Pounds (000) (Preliminary)

Week Ending February 12, 2005		Year-To-Date	
TYPE	2005	2004 1/	2005 2/ 2004
Liquid	171	73	1,273 696
Frozen	5	48	113 190
Dried	40	40	160 511
Total	216	161	1,546 1,397

Inspected Shell Eggs**U.S Exports To Canada, In 30-Dozen Cases (Preliminary)**

Week Ending February 12, 2005		Year-To-Date	
TYPE	2005	2004 1/	2005 2/ 2004
Jumbo	0	0	0 50
Extra Large	0	780	0 1,530
Large	400	750	1,500 4,443
Medium	750	1,500	4,065 2,280
Ungraded	120	7,200	120 7,950
Misc	750	0	750 0
Total	2,020	10,230	6,435 16,253

1/ Comparable Week, to-date figures may not total due to rounding.

2/ Includes revisions to previous week(s).

Data Source: Agriculture and Agri-Food Canada, AISD, AID, Poultry Section

Source: USDA/AMS Poultry Programs, Market News Branch.

U.S./Canadian Live Poultry Slaughtered Under Inspection

W/E 12-Feb-05 (PRELIMINARY)

U.S. Fowl Slaughtered Domestically

	Light Hens	Heavy Hens	Total Hens
-----Thousands-----			
Head	1,305	1,246	2,551
Last Week	1,321	1,336	2,657
Same week yr ago	1,230	1,319	2,549
To-date/2005	8,480	7,513	15,993
To-date/2004	7,834	7,665	15,499

U.S. Fowl Slaughtered in Canada

	Light Hens	Heavy Hens	Total Hens
-----Thousands-----			
Head	267	0	267
Last Week	225	4	229
Same week yr ago	153	7	160
To-date/2005	1,895	4	1,899
To-date/2004	1,592	25	1,617

Data Source: Agriculture and Agri-Food Canada, AISD, AID, Poultry Section

Total U.S. Fowl slaughtered in the U.S. and Canada

	Light Hens	Heavy Hens	Total Hens
-----Thousands-----			
Head	1,572	1,246	2,818
Last Week	1,546	1,340	2,886
Same week yr ago	1,383	1,326	2,709
To-date/2005	10,375	7,517	17,892
To-date/2004	9,426	7,690	17,116

Source: USDA/AMS Poultry Programs, Market News Branch

CENTRAL REGION MECHANICALLY SEPARATED CHICKEN

F.O.B. SHIPPER DOCK OR EQUIVALENT, PRICES NEGOTIATED FOR MECHANICALLY SEPARATED CHICKEN IN THE CENTRAL REGION IN TRUCKLOT AND LESS THAN TRUCKLOT VOLUMES, CENTS PER POUND, DELIVERY WITHIN TWO WEEKS.

Feb 18, 2005

CHICKEN WITH SKIN ADDED

--- PRICES ---		---- VOLUME ----	
FAT			
CONTENT	FROZEN	FRESH	TOTAL EXPORT
15% OR LESS			
RANGE	-	21.00-23.00	102,000 -
WTD AVERAGE		21.80	
15-20%			
RANGE	18.00-19.50	12.50-24.00	1,934,400 840,000
WTD AVERAGE	19.10	18.22	
20% OR MORE			
RANGE	-	20.50-21.00	163,200 -
WTD AVERAGE		20.75	

* INCLUDES THE STATES of AL, AR, IA, IL, IN, KS, KY, LA, MI, MN, MO, MS, ND, NE, OK, OH, SD, TN, TX, WI

EASTERN REGION MECHANICALLY SEPARATED CHICKEN

F.O.B. SHIPPER DOCK OR EQUIVALENT, PRICES NEGOTIATED FOR MECHANICALLY SEPARATED CHICKEN IN THE EASTERN REGION IN TRUCKLOT AND LESS THAN TRUCKLOT VOLUMES, CENTS PER POUND, DELIVERY WITHIN TWO WEEKS.

Feb 18, 2005

CHICKEN WITH SKIN ADDED

--- PRICES ---		---- VOLUME ----	
FAT			
CONTENT	FROZEN	FRESH	TOTAL EXPORT
15% OR LESS			
RANGE	18.25	18.75-22.00	420,000 260,000
WTD AVERAGE	18.25	20.38	
15-20%			
RANGE	16.00-22.50	14.00-23.00	3,668,000 2,028,000
WTD AVERAGE	19.92	18.23	
20% OR MORE			
RANGE	-	19.00	120,000 -
WTD AVERAGE		19.00	

* INCLUDES THE STATES of CT, DE, FL, GA, MA, MD, ME, NC, NH, NJ, NY, PA, RI, SC, VA, VT, WV

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NATIONAL YOUNG TURKEY PARTS AND BULK MEAT, FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS AS OF 18 FEBRUARY 2005.

The market tone on tom drums was barely steady to fully steady, mostly steady; tom 2-joint wings steady to instances weak with increased export interest noted at the lower trending prices; tom necks and full-cut wings steady to barely steady. Demand on tom bulk parts was light to moderate. Offerings of tom wings adequate to instances burdensome, balance adequate to fully adequate. Trading was moderate on tom bulk parts for domestic and export shipments, balance slow. For domestic: fresh hen drums 39, fresh scapula 122, plant grade basted 20-22 lb. breasts 130, fresh breast trim 150 cents delivered. For export: frozen ground drum meat 57, fresh thigh meat 90 cents delivered.

FRIDAY, FEBRUARY 18, 2005

EXPORT TRADING	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)	WEEKLY WTD AVG PRICE	WEEKLY VOLUME (000)
DRUMSTICKS, TOMS	36.00-37.00		36.50	104	36.97	345
WINGS FULL-CUT - TOMS		T	41.00	3	41.00	3
WINGS, V-TYPE, TOM	50.00		50.00	208	46.88	676
TAILS	24.00		24.00	40	23.40	516
MECHANICALLY SEPARATED 2/	19.50		19.50	52	18.72	627
THIGH MEAT - FROZEN	85.00-92.00		87.67	144	93.53	1178

THURSDAY, FEBRUARY 17, 2005

EXPORT TRADING	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS		W	37.00	196
WINGS FULL-CUT - TOMS		T	41.00	3
WINGS, V-TYPE, TOM	45.50		45.50	468
TAILS		W	25.00	160
MECHANICALLY SEPARATED 2/		W	19.00	40
THIGH MEAT - FROZEN	90.00-98.50		96.64	728

WEDNESDAY, FEBRUARY 16, 2005

EXPORT TRADING	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	37.00		37.00	196
WINGS FULL-CUT - TOMS		T	41.00	3
WINGS, V-TYPE, TOM				
TAILS	25.00		25.00	160
MECHANICALLY SEPARATED 2/	19.00		19.00	40
THIGH MEAT - FROZEN		T	89.00	266

TUESDAY, FEBRUARY 15, 2005

EXPORT TRADING	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	37.50		37.50	5
WINGS FULL-CUT - TOMS	41.00		41.00	3
WINGS, V-TYPE, TOM				
TAILS	21.00-24.00		22.52	316
MECHANICALLY SEPARATED 2/	18.50-19.00		18.63	535
THIGH MEAT - FROZEN	87.00-90.00		89.00	266

MONDAY, FEBRUARY 14, 2005

EXPORT TRADING	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	38.00		38.00	40
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM				
TAILS		F	23.00	40
MECHANICALLY SEPARATED 2/		F	18.77	344
THIGH MEAT - FROZEN	88.00		88.00	40

1/ CODES FOR LAST SIGNIFICANT TRADE (L.S.T.): M=MONDAY T=TUESDAY W=WEDNESDAY R=THURSDAY F=FRIDAY

2/ Product contains 15-20% fat with skin added.